



**CARPENTERS
SOUTHWEST
ADMINISTRATIVE
CORPORATION**

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Electronic Delivery Request

As a participant, you are entitled to important material explaining how your various benefits work. You have the option to receive this information electronically. You can also elect to receive important alerts regarding your benefits plans via text messaging.

If you prefer to receive the various Summary Plan Description booklets, Summary of Material Modifications, Summary Annual Reports, and other notices electronically, please complete and sign the section below and return to us in one of the following ways:

- Use the enclosed envelope or by mail at the address above
- Fax to (213) 739 – 9321
- Email to info@carpenterssw.org

This consent applies to electronic communications regarding the Southwest Carpenters Health & Welfare, Vacation, Pension, and Annuity Trusts.

Name	
SSN/UBC	Mobile Phone Number
Email Address	

Signature

Date

- Your consent to receive electronic delivery of Plan documents is valid unless and until you withdraw your consent. You can withdraw your consent and reset your preferences to regular mail at any time.
- Change your email address or mobile phone number at any time by completing a new Electronic Delivery Request form and submitting it to the Trust Office using the contact information above.
- If you do not wish to designate the same email address for all Trusts, you may request separate Electronic Delivery Forms.
- You have the right to request hard copies of documents pursuant to ERISA section 104(b)(4) or opt-out of electronic delivery altogether at any time by contacting the Trust in writing by mail at the address above, by email at info@carpenterssw.org, or by fax at (213) 739 – 9321.
- If you have difficulty accessing any of the documents described above, please contact the Trust Office. Please note that documents posted to the CSAC website may be taken down after one year or earlier if they are superseded by a new version.
- Standard message rates and data charges from the subscriber’s carrier could apply when sending and/or receiving text messages.

The table below has examples of Pension Trust documents that will be delivered electronically.

Disclosure Requirement – Pension Plan	Description of Required Information
Summary Plan Description (SPD) and Summary of Material Modifications (SMM)	The SPD provides a summary of the plan document and other key plan information. The SMM describes material changes to information furnished in the SPD
Annual Funding Notice	Notice of the funded status and financial condition of the Plan, including the Plan’s funded percentage, assets and liabilities, and a description of the benefits guaranteed by the Pension Benefit Guaranty Corporation (PBGC)
Periodic Pension Benefit Statements	Statement of accrued benefit at normal retirement age, and if not vested, when vesting will occur
Notice to Separated Participants with Deferred Vested Benefits	Notice of deferred vested benefits sent to a participant who incurs two successive one-year breaks in service after becoming vested
Notice of Decision on Claim or Appeal	Notice of decision on a claim for benefits or on appeal from a denial of a claim
QDRO Procedures and Notice whether a DRO is Qualified	Notice of domestic relations order (DRO) pending qualification and Qualified Domestic Relations Order (QDRO) notice following review and determination of qualified status
Suspension of Benefits Notice	Notice of suspension of pension provided to retirees who return to work in Prohibited Employment

The table below has examples of Health and Welfare Trust documents that will be delivered electronically.

Disclosure Requirement – Health Plan	Description of Required Information
Summary Plan Description (SPD) and Summary of Material Modifications (SMM)	The SPD provides the plan document and other key plan information. The SMM describes material changes to information furnished in the SPD
Summary of Benefits and Coverage	Annual standardized summary of benefits and coverage available under each benefit package
Notice of Special Enrollment Rights	Notice of the opportunity to enroll in the health plan upon the happening of certain events such as the loss of other coverage; gaining a new dependent through marriage, birth, adoption, or placement for adoption; or becoming eligible for premium assistance under Medicaid or a Children’s Health Insurance Program (CHIP)
HIPAA Notice of Privacy Rights	Notice describing the uses and disclosures of protected health information (PHI) and the individual’s rights and the plan’s (or insurer’s) duties with respect to that PHI
Notice of Creditable Coverage	Notice whether prescription drug coverage under the plan constitutes “creditable coverage” under Medicare Part D rules to help individuals eligible for Medicare Part D determine whether to enroll in Part D coverage during the annual Medicare Part D election period
Summary Annual Report (SAR)	Summary, in narrative form, of the Form 5500 Annual Return/Report of Employee Benefit Plan most recently filed for the plan
COBRA Election Notice with COBRA rates	Notice is given to participants and their covered family members when coverage is lost because of certain “qualifying events” under COBRA

The table below has examples of Vacation Trust documents that will be delivered electronically.

Disclosure Requirement – Vacation Plan	Description of Required Information
Summary Plan Description (SPD) and Summary of Material Modifications (SMM)	The SPD provides the plan document and other key plan information. The SMM describes material changes to information furnished in the SPD
Summary Annual Report (SAR)	Summary, in narrative form, of the Form 5500 Annual Return/Report of Employee Benefit Plan most recently filed for the plan
Request for Benefit Form	The form to request your July 1 st and December 1 st Distribution

The table below has examples of Annuity Trust documents that will be delivered electronically.

Disclosure Requirement – Annuity Plan	Description of Required Information
Summary Plan Description (SPD) and Summary of Material Modifications (SMM)	The SPD provides the plan document and other key plan information. The SMM describes material changes to information furnished in the SPD
Summary Annual Report (SAR)	Summary, in narrative form, of the Form 5500 Annual Return/Report of Employee Benefit Plan most recently filed for the plan